

Registration Form

Online Registration: www.calbar.ca.gov/taxation

2005 Annual Estate & Gift Tax Conference

Name _____ State Bar Number _____

Firm _____

Address _____

City, State and Zip _____

Phone _____ Fax _____

Email _____

Location Choice (check appropriate box)

☐ January 14 – Beverly Hills

☐ January 15 – San Francisco

Program Registration Fees:

☐ Taxation Section Members \$295

☐ Non-Section Members (includes 2005 Section Membership) \$355

☐ After January 7, 2005 (2005 Section Membership not included) \$355

Government Attorneys:

☐ Taxation Section Members \$195

☐ Non-Section Members (includes 2005 Section Membership) \$255

☐ After January 7, 2005 (2005 Section Membership not included) \$255

AMOUNT ENCLOSED/TO BE CHARGED \$ _____

SAVE MONEY BY REGISTERING BY FRIDAY, JANUARY 7, 2005

Credit Card Information

I authorize The State Bar of California to charge my program registration fee to my VISA or MASTERCARD account. (No other credit card will be accepted.)

Account Number: _____ Exp Date: _____

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Register Online: www.calbar.ca.gov/taxation

Make checks payable to The State Bar of California

Mail to: Program Registrations, The State Bar of California,
180 Howard Street, San Francisco, CA 94105

FAX to: Program Registration at (415) 538-2368
Credit card information is mandatory.

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STATE BAR EDUCATION FOUNDATION

The Taxation Section

180 Howard Street

San Francisco, CA 94105

The Thirteenth Annual Estate and Gift Tax Conference

Save money by registering
by Friday, January 7, 2005



The Estate and Gift Tax Committee of the Taxation
Section of the State Bar of California presents

The Thirteenth Annual Estate and Gift Tax Conference

6.5 Hours MCLE and
Legal Specialization Credit

ONLINE REGISTRATION:
www.calbar.ca.gov/taxation

Friday, January 14, 2005

BEVERLY HILLS

Hotel Sofitel

8555 Beverly Boulevard

310.278.5444

Saturday, January 15, 2005

SAN FRANCISCO

Hilton Hotel

333 O'Farrell Street

415.771.1400

The Taxation Section of the State Bar of California is a State Bar of
California approved MCLE provider.

PROGRAM SCHEDULE	
8:00 AM - 9:00 AM	
Registration & Continental Breakfast	
8:50 AM - 9:00 AM	
Welcome & Opening Remarks	
9:00 AM - 10:45 AM	
Estate and Gift Tax Controversy Panel <i>John W. Porter, Esq.</i> <i>Baker Botts, LLP, Houston</i>	
<i>Richard Ullman, Esq.</i> <i>Attorney Advisor, IRS, Los Angeles</i>	
This panel discussion will review recent developments in Estate & Gift Tax audit controversy, emphasizing recent cases in the area of family limited partnerships and approaches used by the IRS to attack FLPs and estate and gift tax returns.	
11:00 AM - 12:00 PM	
Family Business Succession Through Buy-Sell Agreements <i>John Prokey, Esq.</i> <i>Ramsbacher Prokey LLP, San Jose</i>	
Mr. Prokey will discuss use of Buy-Sell agreements in family business succession and alternatives. The discussion will include a review of IRC Section 2703, the recent <u>Blount</u> and <u>Smith</u> cases involving buy-sell agreements and other applicable authority.	

12:15 PM - 1:45 PM	
Luncheon Program	
Planning for Unmarried Couples after January 1, 2005 <i>Sondra Allphin, Esq.</i> <i>Temmerman & Cilley LLP, San Jose</i>	
Sondra Allphin is the author of “New Domestic Partnership Legislation and its Impact on Estate Planning and Administration,” in the Spring 2004 Edition of <i>California Trusts and Estates Quarterly</i> . She will discuss some of the benefits and pitfalls of this new legislation to assist estate planners in advising their clients.	
2:00 PM - 3:30 PM	
Current Developments in Estate and Gift Tax <i>Andrew M. Katzenstein Esq.</i> <i>Katten Muchin Zavis Rosenman LLP, Los Angeles</i>	
Andrew Katzenstein will once again present his comprehensive review of important developments in the estate and gift tax arena. This presentation will include key decisions, regulations, rulings and legislative changes.	
3:45 PM - 5:00 PM	
Tax Planning for Foreign Individuals with U.S. Portfolio and Real Estate Investment <i>Jane Peebles Esq.</i> <i>Freeman, Freeman & Smiley LLP, Los Angeles</i>	
A frequent lecturer on sophisticated domestic and international estate and charitable planning, Ms. Peebles will examine the estate planning issues that arise when a foreign individual owns real estate or portfolio assets in the U.S., or holds an interest in a partnership or other business entity where the partnership is organized in the United States or holds U.S. situs assets, or wishes to benefit relatives who are U.S. residents, as well as pre-immigration transfer tax planning.	

REGISTRATION INFORMATION	
Register Online	
www.calbar.ca.gov/taxation	
Registration by Mail	
Space is limited so registrations must be received by Friday, January 7, 2005. Please send your completed registration form and check payable to The State Bar of California to:	
Program Registrations The State Bar of California 180 Howard Street San Francisco, CA 94105	
Registration by Fax	
Fax to: Program registrations at 415.538.2368. Visa/MasterCard ONLY. Credit card information is mandatory	
On-Site Registrations	
On-site registration opens at 8:00 AM and is subject to space availability	
Cancellation/Refunds	
Cancellations and request for refunds must be received in writing no later than Friday, January 7, 2005. Please fax your request to 415.538.2368, Attn: program registrations	
MCLE Credit	
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Special Assistance	
Please call 415.538.2594 for special assistance or TDD for speech and hearing impaired 415.538.2231	
Questions	
For registration information, please call 415.538.2508 For program content/Section information, please call 415.538.2594	
Audio Tapes	
Audio tapes of the program will be available with a complete set of program materials from Versa-Tape. To order, please call 800.468.2737	